

January 20th, 2020

Dear Client,

Happy New Year! Another year has passed and it is never too early to get a head start on your personal tax return. We thank you for your business and look forward to serving you again this year.

### **Getting Started**

Enclosed is an envelope with a detailed checklist:

- Please complete the personal information section.
- Use the envelope to collect your statements and receipts, a guide is on the back of the envelope.
- Review the questions on the back of this letter and let us know if anything applies to you.

In our continued efforts to be a “green” company by becoming a paperless office, we will be providing a digital copy of your completed return through our secure delivery portal. *\*A paper copy can be provided upon request*

Please deliver your documents to either of our offices in North Vancouver and New Westminster, or request a secure portal link to send information digitally by emailing [accountants@lorennancke.com](mailto:accountants@lorennancke.com). We will be ready and waiting for you.

### **Important Deadlines**

- March 2<sup>nd</sup>, 2020**      **Documents due** from self-employed individuals
- March 20<sup>th</sup>, 2020**      **Documents due** for employment and commission expenses, rental properties or stock transactions
- April 9<sup>th</sup>, 2020**      **FINAL** deadline for documents and **LAST DATE** for personal appointments

We are committed to serving you and maximizing your opportunities for tax savings, and that takes time. Every return is important to us. Therefore, we are unable to guarantee completion of tax returns where the documentation is received after **April 9<sup>th</sup>, 2020**. All returns are processed on a first-come, first-served basis.

If you have any questions or concerns please visit our website at [www.lorennancke.com](http://www.lorennancke.com) or phone us at **604-904-3807**. Anyone here will be happy to help you. We look forward to seeing you soon.

Sincerely,



### **Remember:**

- Please bring your income tax documents before the deadline.
- No appointments scheduled after April 9<sup>th</sup>, 2019.
- Our policy is to collect payment BEFORE we file your return.
- The minimum fee for a tax return is \$300.

**From MARCH 30<sup>th</sup>, 2020 to APRIL 30<sup>th</sup>, 2020 OUR OFFICE HOURS will be Monday to Friday 8:30 am to 5:30 pm and Saturdays from 10:00 am – 2:00 pm, except April 10<sup>th</sup> to 13<sup>th</sup>, 2020 when we will be closed for Easter.**

We would like to ask you to think about the things that may have changed in your life since we saw you last. We do not get to see you every day, so we might not know about them yet and many changes could affect your return in some way.

Have you had any additions to your family this year? Any newborn children? Elderly family members moved in with you?

Has your marital status changed? Have you started residing with a partner or stopped living with one?

Have your children started post-secondary schooling? Did they move to attend school?

Has there been any changes in your health that we should know about? Do you have issues with mobility, sight or hearing?

Did you purchase any new investments or change investment advisors? If you invest, do you borrow money to do so?

Did you change jobs during the year?

Did you retire in the year?

Did you sell your primary residence during the year? If yes, what year did you purchase the home and what were the proceeds?

For more information and checklists for self-employment income, rental income and more, please visit our website at <https://lorennancke.com/resources/>.